View in browser

FinancialPlanning

Wealthtech Weekly

August 21, 2025

By Rob Burgess
Reporter

Agentic artificial intelligence, which is designed to take actions and make decisions autonomously, was the focus of our recent AI Virtual Summit.

A pair of panel discussions, one hosted by Editor-in-Chief Brian Wallheimer and another hosted by this reporter, focused on how advisors can use the technology to deepen client engagement and build a better tech stack.

Have you had any experience with agentic AI? Let me know — robert.burgess@arizent.com.

I hope you'll check out the articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

How to build an AI tech stack that works for advisors and clients

Plus, how can a firm integrate and use AI tools compliantly? Experts discussed that and more at Financial Planning's recent Virtual Summit.

- **How advisors could use agentic AI to deepen client engagement**
  Experts say that letting agentic AI complete rote tasks will leave advisors more time to connect with the clients they serve.
- **As stock market flirts with record highs, why are advisors nervous?**
  The so-called "Magnificent Seven" are doing well, but experts say that doesn't tell the story of the overall economy, which is struggling under the surface.
- **Scoring a stake: Some clients want a piece of pro sports action**

A number of variables including illiquidity and opaque valuations may cause advisors to think twice before recommending this alternative asset to clients.

- **The top 20 energy ETFs of the past 3 years**
  In an increasingly choppy sector, experts say investing with caution and an eye on diversification is key.

Read the latest in Wealthtech

Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

Register today for the industry's can't-miss event.

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: